

Overview

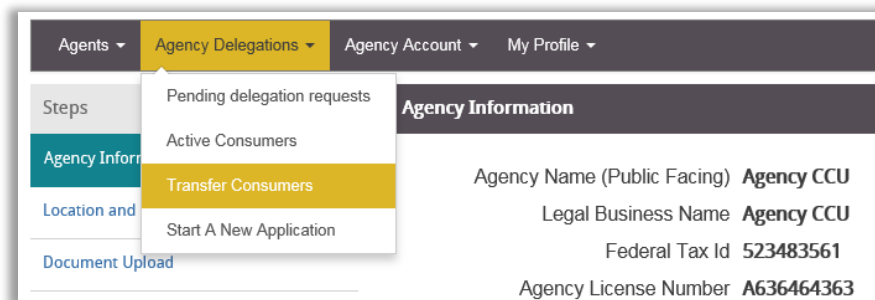
Approved Admin Staff, Level 2, have the ability to transfer consumer delegations between Agents within the Agency without assistance from Covered California. This functionality includes [transferring a single consumer](#), as well as transferring the [entire Book of Business between Agents within the same Agency](#).

Please Note: To transfer consumers or an entire Book of Business to an Agent outside of the Agency, please contact Agent Contracts at agentcontracts@covered.ca.gov for assistance.

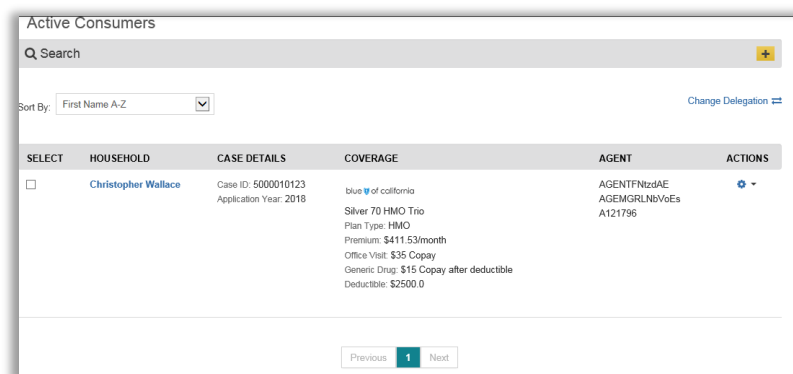
Transferring a Single Consumer


Approved Admin Staff have the ability to transfer a single consumer, multiple consumers, or the entire Book of Business to an Agent within the Agency.

From the “Agency Delegations” drop-down menu, select the “Transfer Consumers” link to navigate to the **Active Consumers** page.




The **Active Consumers** page will display the complete list of consumers delegated to Agents within the Agency.




A search for a specific consumer can be done by selecting the  and entering the consumer’s full first and/or last name, or other identifiable information.


The Approved Admin Staff can select one, or multiple consumers listed to transfer to a specific Agent by placing a check mark in the box in the “Select” column.


Next, there are two options to transfer delegations:



- The **“Change Delegation”** beneath the Search section of the page or
- In the Actions column next to the consumer you wish to transfer by selecting the  and clicking the **“Change Delegation”** link

Active Consumers

Search 

Sort By: First Name A-Z 

[Change Delegation](#) 

SELECT	HOUSEHOLD	CASE DETAILS	COVERAGE	AGENT	ACTIONS
<input type="checkbox"/>	Christopher Wallace	Case ID: 5000010123 Application Year: 2018	blue  of california Silver 70 HMO Trio Plan Type: HMO Premium: \$411.53/month Office Visit: \$35 Copay Generic Drug: \$15 Copay after deductible Deductible: \$2500.0	AGENTFNtzdAE AGEMGR A121796	 <ul style="list-style-type: none"> Account Household ✓ Eligibility ✗ Mark as Inactive Change Delegation

The Approved Admin Staff is then navigated to the **Transfer Consumer Delegations** page where they will search for the Agent to transfer the consumer delegation.

Transfer Consumer Delegations

Please select an agent below and click the RE-ASSIGN button to transfer the consumer Christopher Wallace to the selected agent.

Search for an Agent

Agent First Name Agent Last Name Site

Agent Email Agent License No

Pick Agent	Agent Name	Email	Primary Site	RE-ASSIGN
<input type="radio"/>	AGENTFNtzdAE AGEMGRlnbVoEs		2329 gateway oaks parkway 108 Sacramento, CA 95818	<input type="button" value="RE-ASSIGN"/>
<input type="radio"/>	ageMGRfnBQZUf ageMGRInuCOvq		2329 gateway oaks parkway 108 Sacramento, CA 95818	

After locating the Agent desired, select the radio button next to their name. Select “Re-assign” to transfer the consumer from one Agent to another.

Pick Agent	Agent Name	Email	Primary Site
<input checked="" type="radio"/>	AGENTFNtzdAE AGEMGRLNbVoEs		2329 gateway oaks parkway 108 Sacramento, CA 95818
<input type="radio"/>	ageMGRfnBQZUf ageMGRInuCOvq		2329 gateway oaks parkway 108 Sacramento, CA 95818

RE-ASSIGN

The Approved Admin Staff will then get a confirmation pop-up that the delegation has been transferred and re-assigned from one agent to the other.

Success
✕


Consumer case successfully re-assigned to agent AGENTFNtzdAE AGEMGRLNbVoEs.

CLOSE

This can be confirmed by looking at the **Active Consumer** page and noting the new Agent delegated to the consumer.

Transfer an Entire Book of Business between Agents within the Agency

Approved Admin Staff can also transfer an entire Book of Business from one agent to another agent within the Agency. From the Agency Portal dashboard, locate the Agent with a Book of Business that needs to be transferred.

In the **Actions** column, select the  and click “Transfer Consumer Delegation” link and you will be navigated to the **Transfer Consumer Delegations** page.

Agents ▾ Agency Delegations ▾ Agency Account ▾ My Profile ▾							
Refine Results By Reset All		Agent Name	Active/Inactive	Consumers	Agent License #	Certification Status	Actions
First Name	<input type="text"/>	Carolyn Agent	Active	0	1234567	Certified	
Last Name	<input type="text"/>	Francesca Agent	Active	1	A121796	Certified	
Agent Status	<input type="text"/>	Josh Manager	Active	0	A165645	Certified	

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⚙

✎ Edit

➡ Transfer Consumer Delegations

Search for the Agent you are transferring the Book of Business to by entering any of the following:

- Agent First Name
- Agent Last Name
- Site
- Email Address
- License Number

The results of the search will display Agents within the Agency matching the search criteria entered.

Select the radio button next to the Agent that is accepting the Book of Business transfer and click the “Re-Assign” button to transfer all consumers delegated to one agent, to another agent.

Transfer Consumer Delegations

Please select an agent below and click the RE-ASSIGN button to transfer all consumers for agent Francesca Agent to the selected agent.

Search for an Agent

Agent First Name
Agent Last Name
Site

Agent Email
Agent License No

Pick Agent	Agent Name	Email	Primary Site	
<input checked="" type="radio"/>	Francesca Agent		2329 gateway oaks parkway 108 Sacramento, CA 95818	
<input type="radio"/>	Josh Manager		2329 gateway oaks parkway 108 Sacramento, CA 95818	

The Approved Admin Staff will then get a confirmation pop up that the delegations has been transferred and re-assigned from one agent to the other.

Success

Consumer case successfully re-assigned to agent Francesca Agent.

This can be confirmed by looking at the **Active Consumer** page and noting the new Agent delegated to the consumers.